

What the Scheme Manager Role means at your Scheme

A clearer picture of what
happens day to day



Every retirement community looks a little different, but one thing we all have in common is a Scheme Manager or visiting Manager whose role is to help keep our schemes safe, well managed and pleasant places to live.

Some of what Scheme Managers do is easy to see. Much more happens quietly behind the scenes. This guide sets out what that work looks like and what it means for residents living in the scheme.

Keeping our scheme safe

A significant part of the Scheme Manager role is focused on fire and health and safety. This work happens regularly and must be completed to meet legal and safety requirements.

Scheme Managers:

- ✓ Carry out daily, weekly, monthly and annual fire safety checks
- ✓ Check fire alarms, emergency lighting, fire doors and escape routes
- ✓ Test pull cords, pendants and emergency call systems
- ✓ Visually check communal areas for hazards
- ✓ Monitor lifts, lighting and CCTV (where installed)
- ✓ Record and report accidents, incidents and near misses
- ✓ Liaise with emergency services when required
- ✓ Raise safeguarding concerns and follow agreed processes

How this helps residents

It means our homes are checked carefully and consistently, helping us feel safe and reassured. Some safety related decisions can't be changed, but the reasons will always be explained.





Looking after the building and shared areas

Scheme Managers are responsible for the day to day care of communal spaces and shared facilities.

This includes:

- ✓ Raising and following up repairs to communal areas
- ✓ Monitoring cleaning, gardening and maintenance contractors
- ✓ Checking corridors, lounges, laundries and shared rooms
- ✓ Observing the general condition of roofs, gutters, paths, gardens and car parks and reporting any concerns
- ✓ Making sure contractors work safely and to a good standard
- ✓ Managing services such as lifts, fire systems and shared equipment
- ✓ Carrying out regular visual checks of shared furniture and fixtures

How this helps residents

Shared spaces are looked after on everyone's behalf, so we can enjoy clean, tidy and well maintained surroundings without having to organise this ourselves.

Being a clear point of contact at the scheme

Scheme Managers help residents understand how the scheme works and who to contact when things need attention.

They:

- ✓ Review applications, interview and assess prospective buyers
- ✓ Carry out agreed welfare checks
- ✓ Welcome new residents and explain how the scheme operates
- ✓ Share information about day to day arrangements
- ✓ Listen to concerns and queries about the scheme
- ✓ Help resolve issues relating to communal living
- ✓ Act as a link between residents and Home Group
- ✓ Signpost to external services or information when asked

How this helps residents

There is a familiar, knowledgeable person linked to the scheme who can help explain processes, raise issues through the right routes and keep communication clear.





Communication and community life

Scheme Managers help keep everyone informed while respecting that being involved is always a personal choice.

This includes:

- ✓ Preparing newsletters and letters
- ✓ Keeping noticeboards accurate and up to date
- ✓ Holding drop in sessions or surgeries
- ✓ Attending coffee mornings and meetings
- ✓ Working alongside residents' associations
- ✓ Helping arrange scheme meetings and consultations
- ✓ Encouraging feedback and sharing information about how to have a say

How this helps residents

We know what's happening at our scheme, how decisions are made and how we can share views if we wish – without any pressure to take part.

Managing scheme level finances

Scheme Managers look after finances linked to shared services and communal areas, not residents' personal finances.

Their role includes:

- ✓ Monitoring the scheme budget
- ✓ Processing invoices and purchase orders
- ✓ Managing income from shared facilities such as laundries or guest rooms
- ✓ Supporting service charge processes
- ✓ Attending budget and accounts meetings
- ✓ Helping deliver Section 20 consultations where required

How this helps residents

Money collected through service charges is monitored carefully, with opportunities for residents to be informed and involved through the correct consultation processes.

Records, checks and behind the scenes work

Some parts of the role aren't immediately visible but are essential to keeping the scheme running smoothly.

Scheme Managers:

- ✓ Keep records and emergency information up to date
- ✓ Update systems and logs
- ✓ Complete inspections, reports and reviews
- ✓ Liaise with other Home Group teams
- ✓ Prepare for audits and compliance checks
- ✓ Complete required training and learning



How this helps residents

Accurate records and regular checks help ensure issues are dealt with properly and nothing important is missed.

Clear boundaries within the role

To help everyone live well together, Scheme Managers work within clear professional boundaries.

They do not:

- ✗ Provide personal or medical care
- ✗ Help with medication, washing, dressing, shopping or meals
- ✗ Act as carers, cleaners or family members
- ✗ Manage residents' personal finances
- ✗ Make personal decisions on behalf of residents
- ✗ Provide out of hours assistance



Instead, their role is to maintain the scheme and point residents towards the right information or services when needed.

How this helps residents

Clear professional boundaries protect independence, privacy and dignity – and help ensure relationships remain respectful and fair.

A shared understanding

By understanding what Scheme Managers do – and the professional boundaries they work within – we can build:

- ✓ Clearer expectations
- ✓ Better communication
- ✓ More consistent experiences across schemes
- ✓ Stronger, more respectful communities





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